CLINICAL AUDIT TOOL

PCS CLINICAL AUDIT TOOL®

Scheduled Collections User Guide

Version 2.0.3

PEN COMPUTER SYSTEMS

HEALTH INFORMATICS 18 1993 - 2010

Microsoft CERTIFIED Partner

Company Contacts

Sydney (Head Office)

Pen Computer Systems
Level 6, The Barrington
10-14 Smith St
PARRAMATTA NSW 2150

Phone: +61 2 9635 8955
Fax: +61 2 9635 8966
Email: enquiries@pencs.com.au
Web: www.pencs.com.au

Melbourne Office

Pen Computer Systems
Level 5
434 St Kilda Rd
MELBOURNE VIC 3004

Phone: +61 3 9866 8477
Fax: +61 3 9866 5699

Document Contact

Contact: Christine Chidgey
Project Officer

Phone: +61 3 9866 8477

Email: christine.chidgey@pencs.com.au

Document Control

Version	Date	Modified By	Description
0-1	15-07-2009	Christine Chidgey	Initial creation of document
0-2	30-07-2009	Pamela Scicluna	Review & minor edits
0-3	30-07-2009	Christine Chidgey	Updates for release
0-4	04-08-2009	Christine Chidgey	Add further information about scheduler configuration
0-5	17-09-2009	Christine Chidgey	Update .Net requirements which were in error Add troubleshooting section
0-6	24-11-2009	Christine Chidgey	Updates for changes to installation process
0-7	25-11-2009	Pamela Scicluna	Review & minor edits
0-8	30-11-2009	Christine Chidgey	Update error in .NET requirements
0-9	15-02-2010	Christine Chidgey	Updates for functionality which ensures the scheduler options are only available if the user has configured the scheduler preferences correctly. Add a reference to the CHIP User Manual under the Scheduler Tasks section. Add installation checklist.
1-0	23-02-2010	Pamela Scicluna	Review & acceptance for release
1-1	24-02-2010	Pamela Scicluna	Accepted minors edits suggested by the RACGP
1-2	24-02-2010	Christine Chidgey	Updates following PCS Support review. Include section for uninstall of scheduler. Updates for removal of test collection and collection configuration checks.
1-3	13-07-2010	Christine Chidgey	Minor updates following RACGP review
1-4	17-12-2010	Pamela Scicluna	Renaming of 'Oxygen' to 'CHIP'
1-5	09-08/2011	Christine Chidgey	Add Communicare compatibility
1-5	14-02-2012	Matthias Merzenich	Added Windows password policy details
1-6	21-06-2012	Christine Chidgey	Updates for scheduler changes
2-0	29-10-2012	Christine Chidgey	Added Login Screen – scheduler now needs a licenced account to be able to install
2-0-2	07-11-2012	Christine Chidgey	Updates to checklist Update Notifications screen
2-0-3	26-11-2012	Christine Chidgey	Final version following review

Contents

1 INTRODUCTION 5

1.1 PCS Clinical Audit Tool® (CAT) 5
1.2 PCS Scheduler 5
1.3 CAT Scheduled Collections User Guide 6
1.4 Relevant Documents 6
1.5 Intended Audience 6
1.6 Glossary of Terms 7

2 SYSTEM REQUIREMENTS 8

2.1 Microsoft .NET Framework 8
2.2 Windows Account Configuration 8
2.3 Clinical Desktop System Compatibility 8
2.4 PCS Clinical Audit Tool® 8

3 INSTALLATION 9

3.1 Who Should Setup the Scheduler 9
3.2 Prerequisites 10
3.3 PCS Scheduler Service Installation 11

4 CONFIGURING THE CAT SCHEDULER 16

4.1 CAT Scheduler Preferences 17
4.2 CAT Scheduler Menu Options 18
4.3 Configuring a Scheduled Collection & Notifications 19
4.4 Scheduler History 23

5 TROUBLESHOOTING 25

5.1 Check the Scheduler Service is running 25
5.2 Installing new versions of the Scheduler 25
5.3 Uninstalling the Scheduler 26

6 SCHEDULER INSTALLATION CHECKLIST 27

7 CREATE SCHEDULED TASK TO CHECK FOR CAT UPDATES (NON XP MACHINES) 29

8 CREATE SCHEDULED TASK TO CHECK FOR CAT UPDATES (XP MACHINES) 33

1 Introduction

1.1 PCS Clinical Audit Tool® (CAT)

The PCS Clinical Audit Tool® (CAT) analyses clinical information from GP Clinical Desktop Systems. It translates data into real statistical and graphical information that is easy to understand and action. This allows practitioners to assess and improve the quality and completeness of patient information. The benefit to the practice is to assist with its ongoing accreditation and provide opportunities to grow practice income. The emphasis of the tool is to help practice staff to take specific action to improve patient coverage in chronic disease management and prevention.

Other benefits of CAT are many and include:

- targeting patients with particular needs
- targeting patients with specific health risk profiles
- improved compliance with statistical data collections
- extracting data to meet the needs of others
- meeting reporting requirements

Statistics that are required for the Australian Primary Care Collaboratives (APCC) program and the DoHA Future Directions Key Performance Indicators for Divisions are a by-product of the use of the system.

1.2 PCS Scheduler

The PCS Scheduler provides the practice with the ability to setup CAT scheduled data collections. To use the CAT Scheduled Collections functionality you need to ensure you have installed the PCS Scheduler Service. This is an additional installation to CAT. This service is only required to be installed on one practice PC. We recommend to install the scheduler on your server or a PC that is never turned off to ensure that scheduled data collection after hours will take place as planned. You can check if the scheduler has been installed through Windows Add/Remove Programs.

Scheduled data collections can be configured to run in a variety of ways including:

- At regular intervals e.g. monthly
  This will ensure that collections are done without a practice staff member having to remember to physically open CAT and hit the 'Collect' button. Regular collects are important if the practice wants to:
  - measure improvement in outcomes or
  - provide Divisions with data for reporting purposes.

- Overnight
  This will ensure practices with large datasets, where the collect process can be quite lengthy, can collect data overnight and have it available for analysis when needed.

In order for a scheduled collection to run, the PC with the schedule installed **must be switched on**. However, the user may be logged out at the time the collection is scheduled. If the PC is off when a collection is due to run it will not run at the scheduled time but will be triggered to run as soon as the PC is next switched on.

Behind the Scenes
Once a scheduled collection has been setup, the PCS Scheduler Service will detect that a change has been made to the schedule and action accordingly. The PCS Scheduler Service, by default, will check for schedule changes every 10 minutes. When it is time to action the scheduled collect, the PCS Scheduler Service executes CAT in silent mode to perform the automatic collection.

1.3 CAT Scheduled Collections User Guide

The purpose of this document is to provide instructions on how to install and use the CAT Scheduler. It should be used as a supplementary guide to the main user guide: **'PCS Clinical Audit Tool – User Guide'**. Some user instructions in this guide assume a general understanding of how to use CAT. References will be made to the main user guide where necessary.

1.4 Relevant Documents

'PCS Clinical Audit Tool – User Guide'
This User Guide provides instructions on how to install and use the functionality provided by the CAT. It should be available as a prerequisite to this guide and will be referred to throughout this guide where necessary.

This guide is available from http://help.pencs.com.au/cat.htm.

1.5 Intended Audience

This document has been prepared for CAT users.

1.6 Glossary of Terms

Term	Definition
APCC	Australian Primary Care Collaboratives
CAT	PCS Clinical Audit Tool®; developed by PCS
CHIP	Clinical Health Improvement Portal (Data Aggregation and Reporting System administered by the RACGP)
Clinical Desktop System	A general term used for the computer program used by a clinician to record patient clinical information
DoHA	Department of Health & Ageing
PCS	Pen Computer Systems Pty Ltd
RACGP	Royal Australian College of General Practitioners

Table 1: Glossary of terms used in this document

2 SYSTEM REQUIREMENTS

The Scheduler requires at a minimum the System Requirements outlined in the main CAT User Guide - 'PCS Clinical Audit Tool – User Guide'.

NOTE: The Scheduler is only required to be installed on one practice PC.
It must be installed under a Windows Account with Administrator rights and, because it uses Windows Services, the account must NOT enforce password change.

2.1 Microsoft .NET Framework

The Scheduler requires the Microsoft .NET Framework version 2.0 or later.

2.2 Windows Account Configuration

The scheduler must be installed under a Windows Account with Administrator rights and, because it uses Windows Services, the account must NOT enforce password change.

If a Windows Password Policy is in place that forces all users to change their password periodically you will need to use or setup a 'service' account that is exempt from this rule. The scheduler service needs to use the windows password to run and if it is changed after installation the scheduler service won't be able to start. This 'service' account will also need to have CAT installed with at least one successful collection performed.

2.3 Clinical Desktop System Compatibility

The Scheduler is compatible with the following clinical desktop systems:

- Medical Director Versions 2 and 3
- Best Practice
- ZedMed
- Communicare
- MedTech32

Note for Genie, practiX and Medinet Users: The data collections for these clinical systems are performed from within the clinical system software and hence cannot be called by the CAT Scheduler.

2.4 PCS Clinical Audit Tool®

The Scheduler (v2.0.3) requires a minimum of the PCS Clinical Audit Tool® version 3.4.

3 INSTALLATION

The Scheduler requires the following installations:

1. PCS Clinical Audit Tool® (minimum v3.4)
2. PCS Scheduler Service (v2.0.3) (separate installation)

NOTE: The Scheduler Service is only required to be installed on one practice PC.

The PCS Scheduler Service will be made available to all CAT users (by request) but it is provided as a separate installation. The reasons for this approach are:

1. The scheduler will not be required by all users.

   In a practice environment it is likely that scheduled collections will only be setup on one users PC to avoid multiple collections running at the same time.

2. The scheduler will require higher permissions than the standard CAT to install and run. It must be installed under a Windows Account with Administrator rights and, because it uses Windows Services, the account must NOT enforce password change

3. The scheduler needs to be configured to suit the needs of a variety of different situations (practices, research, Division testing) and hence needs separate user instructions and support to ensure it is setup correctly.

3.1 Who Should Setup the Scheduler

CAT can be installed on multiple PCs in a practice and each installation functions independently. This means that it is possible for the scheduler to be setup multiple times. Different installations don't know about each other and can't alert that a schedule exists elsewhere.

Clearly it will not be practical for multiple users in a practice to each be setting up their own schedule. There needs to be clear communication to the users that the scheduler should be setup on only one PC and they need to decide which one that should be.

One solution is to set it up on the server which has the database, under the Administrator account, but this will depend on the practice's IT policy.

Information will be distributed to practices via their Division to help them decide the best way to setup the scheduler.

3.2 Prerequisites

- **Windows Account Configuration**
  If a Windows Password Policy is in place that forces all users to change their password periodically you will need to use or setup a 'service' account that is exempt from this rule. Scheduler needs to use the windows password to run and if it is changed after installation schedule won't be able to function. This 'service' account will also need to have CAT installed and at least one successful collection performed.

- **PCS Clinical Audit Tool®**
  The PCS Clinical Audit Tool® must be installed on the PC/account running the scheduler and a successful collection must have been run on this PC/account prior to installation.

  Please refer to main CAT User Guide - 'PCS Clinical Audit Tool – User Guide'.

  Communicare users*:** The Communicare CAT extractor allows you to select one or more locations. Ensure ***all locations required are selected on the Scheduler PC under the profile that will be logged in when the scheduler runs. (These preferences are stored in an .ini file in the Communicare profiles folder of the user logged in.)

- **Email Notifications**
  If you wish to receive email notifications advising the outcome of your scheduled tasks (success or failure) you will be required to enter the mail server credentials (mail server name, username and password) when you configure the scheduled collections. Your System Administrator will be able to provide these details.
  NOTE 1: If your mail server does not require a username and password these fields may be left blank.
  NOTE 2: These can be entered later if you do not have them available at the time of installation.

3.3 PCS Scheduler Service Installation

Please ensure that CAT is closed before beginning the installation.

Installation of the Scheduler service requires administrative privileges.

1. The scheduler is provided as a zip file. Using Microsoft Internet Explorer, go to the installation URL provided to you by PCS. Contact the PCS Help Desk on 1800 762 993 if you have not been provided with these details.

2. At the 'File Download' screen click **Save**. Save the zip file to a location of your choice.

3. Browse to the location where you have saved the file and unzip the file. The unzipped folder location must be local to the PC you are using and should not be the Desktop.

4. From the unzipped folder double click the file **StartSchedulerInstall.exe**

5. At the Scheduler Login screen enter your username and password (Figure 3.4A). Click Ok.

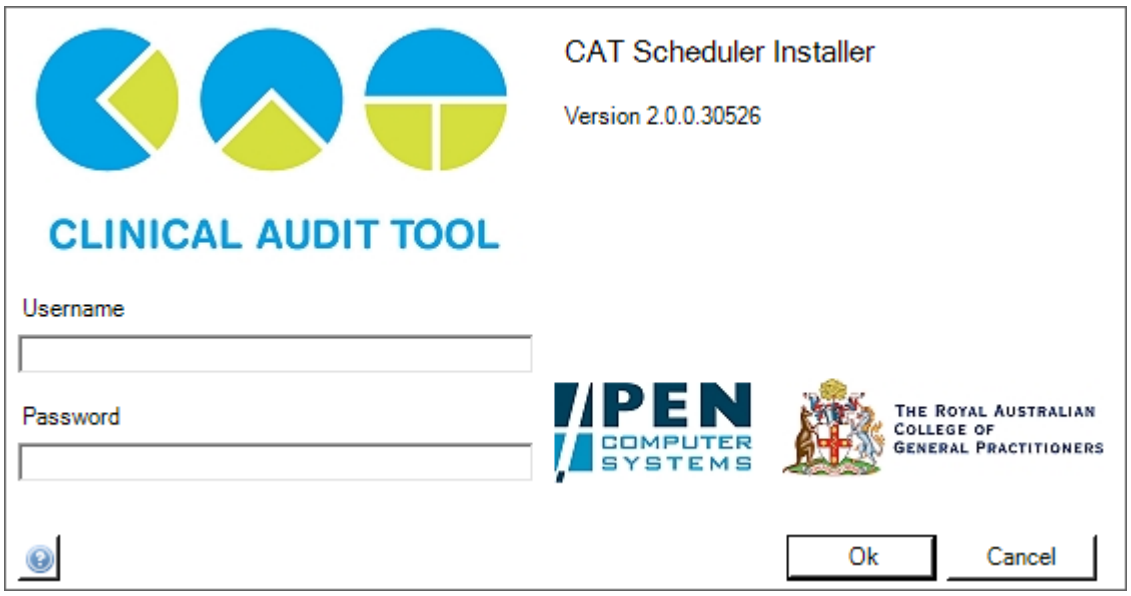


Figure 3.4A: Scheduler Login screen

6. Check that all the scheduler prerequisites have been met (Figure 3.4B)
7. Tick the checkbox to confirm the configuration is complete
8. The 'Continue' button will become active
9. Click **Continue**
   Note: if CAT is not configured correctly you will receive an alert telling you what needs to be fixed. For example:
   - The GP clinical system may not have been selected in CAT
   - An extract may not have been completed

   You will need to login to CAT and fix the alerts before installing the Scheduler.

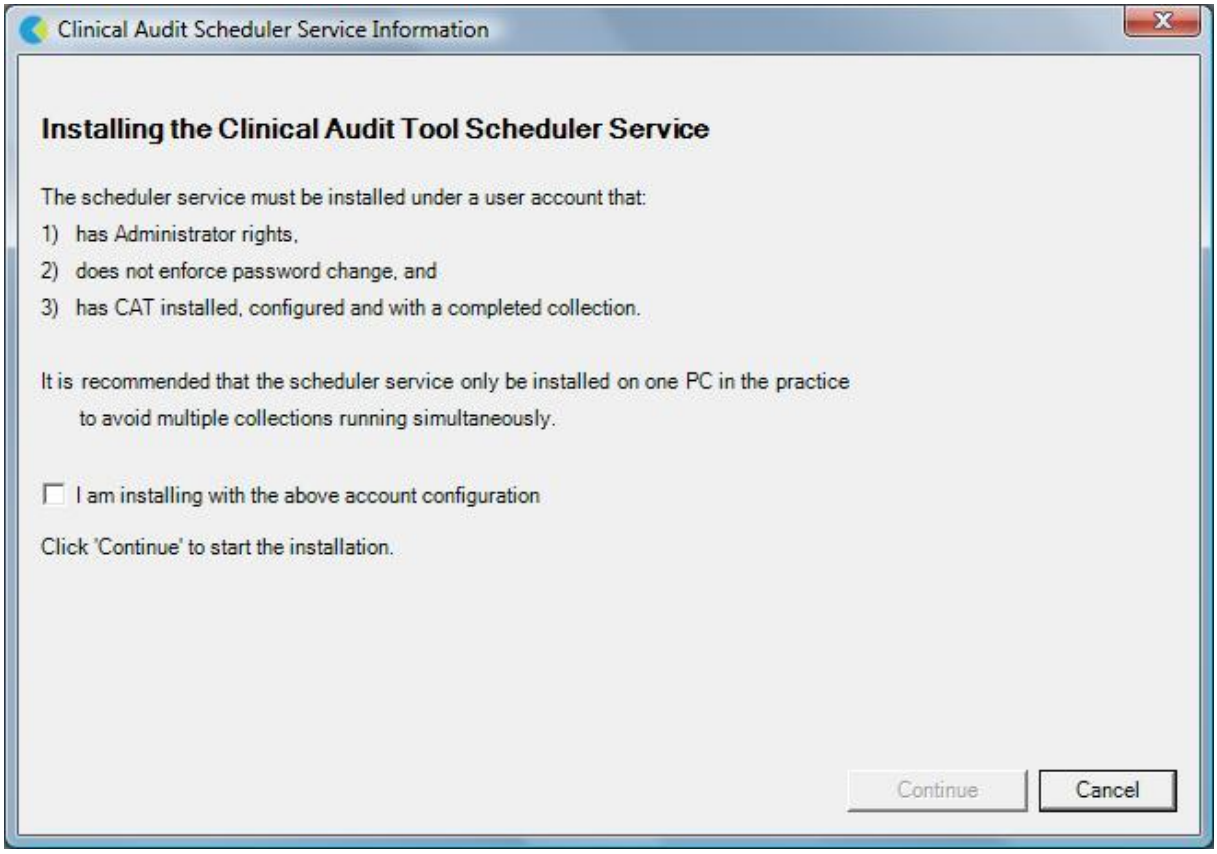

Clinical Audit Scheduler Service Information
Installing the Clinical Audit Tool Scheduler Service
The scheduler service must be installed under a user account that:
1) has Administrator rights,
2) does not enforce password change, and
3) has CAT installed, configured and with a completed collection.
It is recommended that the scheduler service only be installed on one PC in the practice to avoid multiple collections running simultaneously.
I am installing with the above account configuration
Click 'Continue' to start the installation.
Continue
Cancel

Figure 3.4B: Scheduler installation checklist

10. Enter your account credentials and click **Continue**

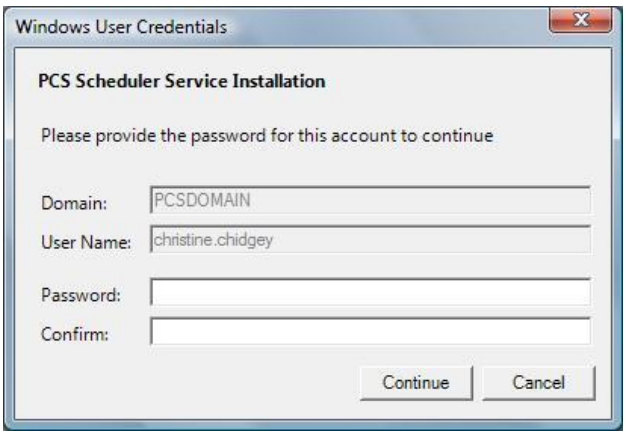


Figure 3.4C: Account credentials dialogue box

11. The Scheduler Setup Wizard will start. Click **Next** (Figure 3.4D)

PCS Scheduler Service
Welcome to the PCS Scheduler Service Setup Wizard
The installer will guide you through the steps required to install PCS Scheduler Service on your computer.
WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
Cancel
< Back
Next >

Figure 3.4D: Scheduler Setup Start screen

12. Accept the default installation folder and click **Next** (Figure 3.4E)

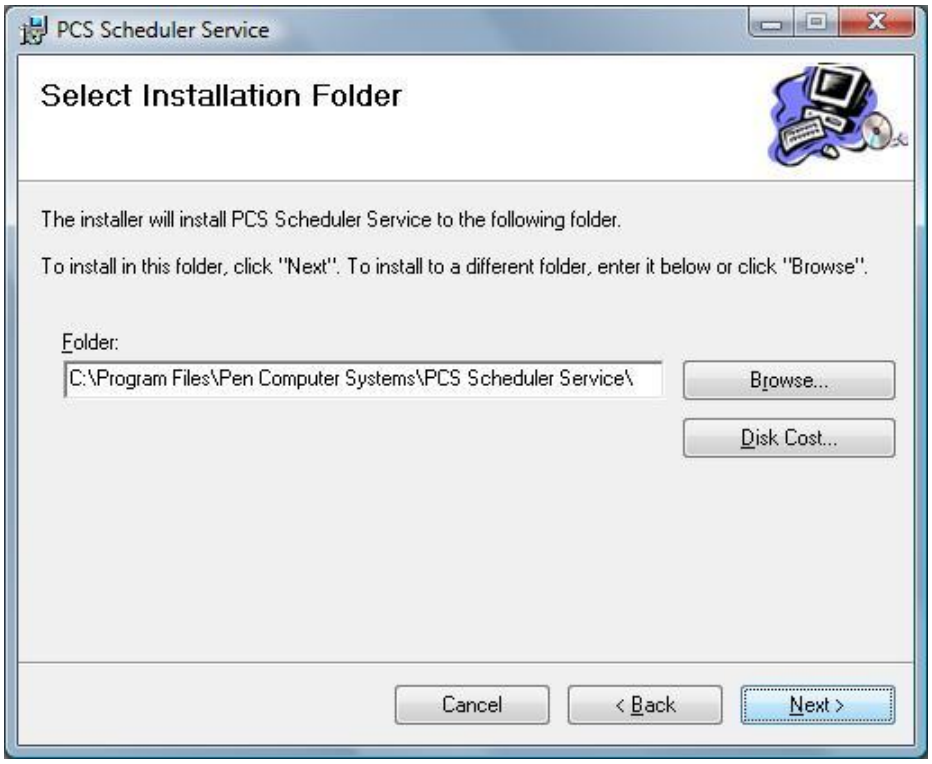

PCS Scheduler Service
Select Installation Folder
The installer will install PCS Scheduler Service to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files\Pen Computer Systems\PCS Scheduler Service\
Browse...
Disk Cost...
Cancel
< Back
Next >

Figure 3.4E: Scheduler Setup Installation Folder

13. Click **Next** to confirm the installation (Figure 3.4F)

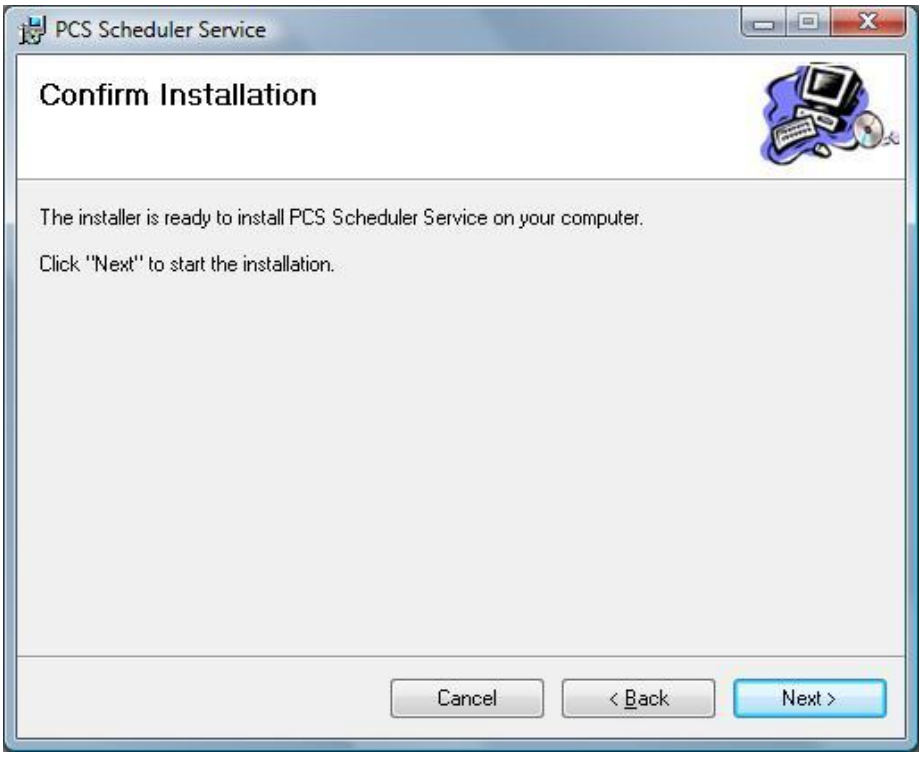

PCS Scheduler Service
Confirm Installation
The installer is ready to install PCS Scheduler Service on your computer.
Click "Next" to start the installation.
Cancel
< Back
Next >

Figure 3.4F: Scheduler Setup Confirmation

14. The installation will start and a progress bar will be displayed (Figure 3.4G)

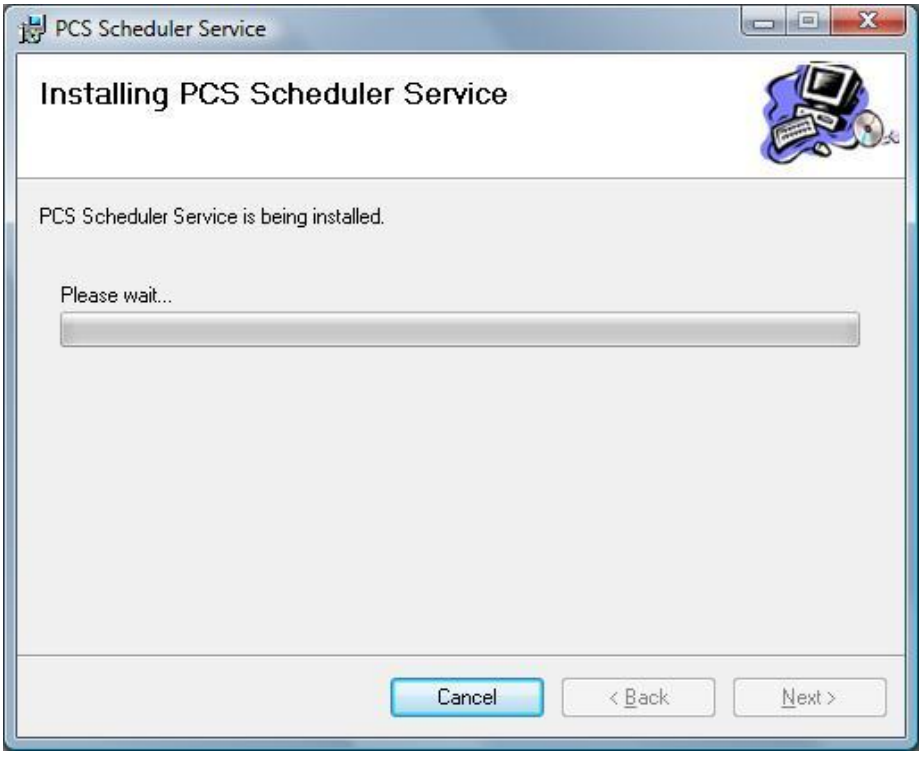


Figure 3.4G: Scheduler Setup installation progress

15. You will be prompted when the installation has completed (Figure 3.4H).
16. Click **Close**

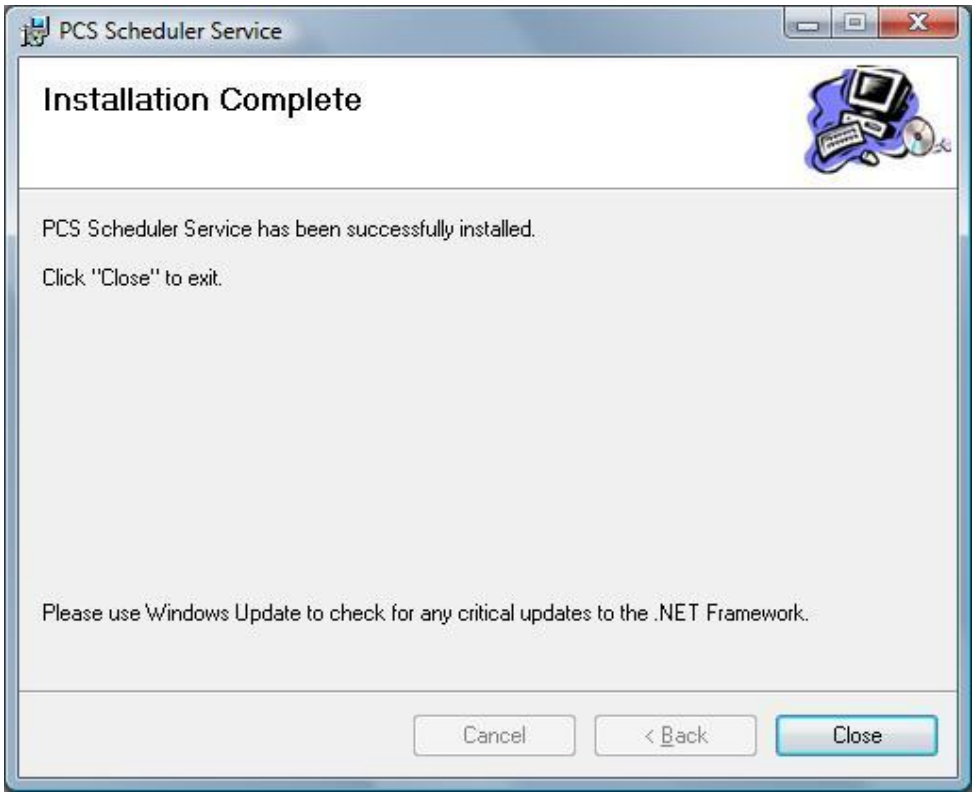

PCS Scheduler Service
Installation Complete
PCS Scheduler Service has been successfully installed.
Click "Close" to exit.
Please use Windows Update to check for any critical updates to the .NET Framework.
Cancel
< Back
Close

Figure 3.4H: Scheduler Setup installation complete

The Scheduler Service will be installed by default to:

C:\Program Files\Pen Computer Systems\PCS Scheduler Service

On 64bit Windows systems it will be installed to:

C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service

You will need this folder pathway when you configure the scheduler preferences.

If you need to reinstall the scheduler or install a new version you will need to first uninstall your existing version. Refer to the section 'Uninstalling the Scheduler' for the steps you should follow.

Configuring the CAT Scheduler

The CAT Scheduler is available as a menu option from the CAT top level menu (Figure 4A). This menu option will only be available if the Scheduler is installed and the CAT Scheduler preferences have been configured.

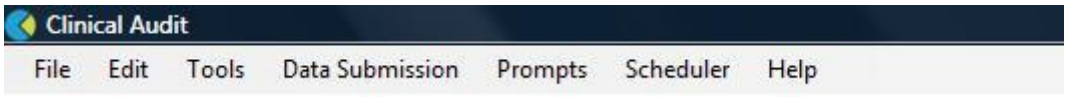


Figure 4A: CAT Scheduler menu option

The Scheduler menu option allows you to:

- Update existing Scheduler tasks
- Add new collection tasks (a maximum of 6 tasks are allowed)
- View the history log of tasks that have run

Figure 4B: CAT Scheduler menu sub options

To configure the CAT Scheduler you will need to:

- Update the CAT Scheduler Preferences screen if required
- Set up CAT Scheduled Tasks (configuring the collection schedule and notifications)

3.4 CAT Scheduler Preferences

The CAT scheduler preferences allow users to set the working folder. This folder is where CAT can update scheduled tasks and retrieve the scheduler history. It is monitored by the 'PCS Scheduler Service' so that scheduled tasks are run when required.

> CAT will automatically look for the default folder **'C:\Program Files\Pen Computer Systems\PCS Scheduler Service'**. If this folder is found and the preferences working folder is empty CAT will pre-populate the preference. If you are working on a 64bit system the folder will be called C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service

If you do not have the Scheduler as a CAT menu option you will need to configure the CAT Scheduler Preferences screen (Figure 4.1A):

1. Open CAT
2. Click the **Edit** > **Preferences** menu
3. From the **Clinical Audit Preferences** dialog choose the **Scheduler** tab (Figure 4.1A)
   Note: If the Scheduler tab is not visible (due to your window size) a right arrow key will be available to scroll across. Alternatively, you can widen the window.

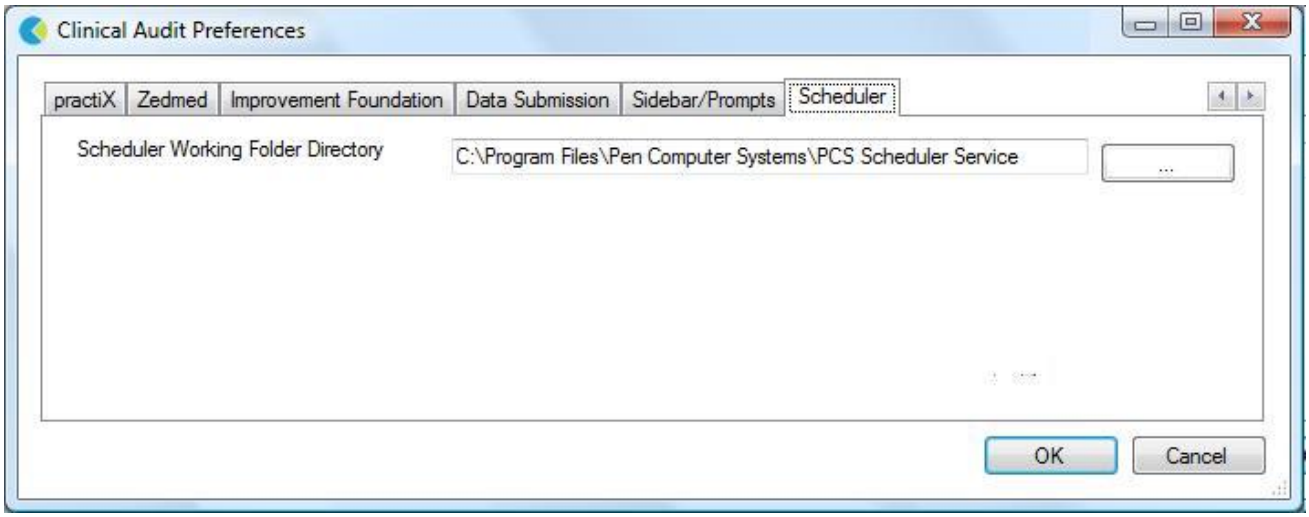


Figure 4.1A: Scheduler Preferences tab

4. Set the Scheduler Working Folder:
   Click the **Browse** button and browse to the '**C:\Program Files\Pen Computer Systems\PCS Scheduler Service**' folder. If you are working on a 64bit system the folder will be called C:\Program Files (x86)\Pen Computer Systems\PCS Scheduler Service If neither folder is available then the scheduler service has not been installed on this PC.
5. Click **OK**

3.5 CAT Scheduler Menu Options

The Scheduler will appear as a menu option on the Clinical Audit toolbar (Figure 4.2A) once the preferences have been configured. This menu has the following options:

- Scheduled Tasks – allows you to update existing Scheduled Collections
  Notes:
  - The status of existing tasks (enabled/disabled) will be displayed
  - Two preconfigured tasks will be available for end of year reporting requirements. The practice can update these tasks and choose whether to enable them.
- Add New Collection – allows you to add a new collection schedule
- History – allows you to view the Scheduler History

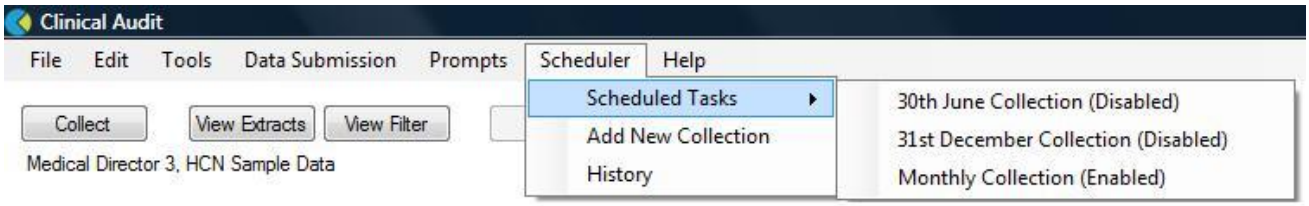


Figure 4.2A: Scheduler menu options

3.6 Configuring a Scheduled Collection & Notifications

1. From the Clinical Audit Toolbar, choose **Scheduler** > **Scheduled Tasks > Add New Collection**.
   The Schedule dialog will open (Figure 4.3A). It provides two tabs:
   - Configuration – this tab allows you to configure a Scheduled Collection
   - Notifications – this tab allows you set the notification options that should occur in the event of a collection Success, Warning or Failure

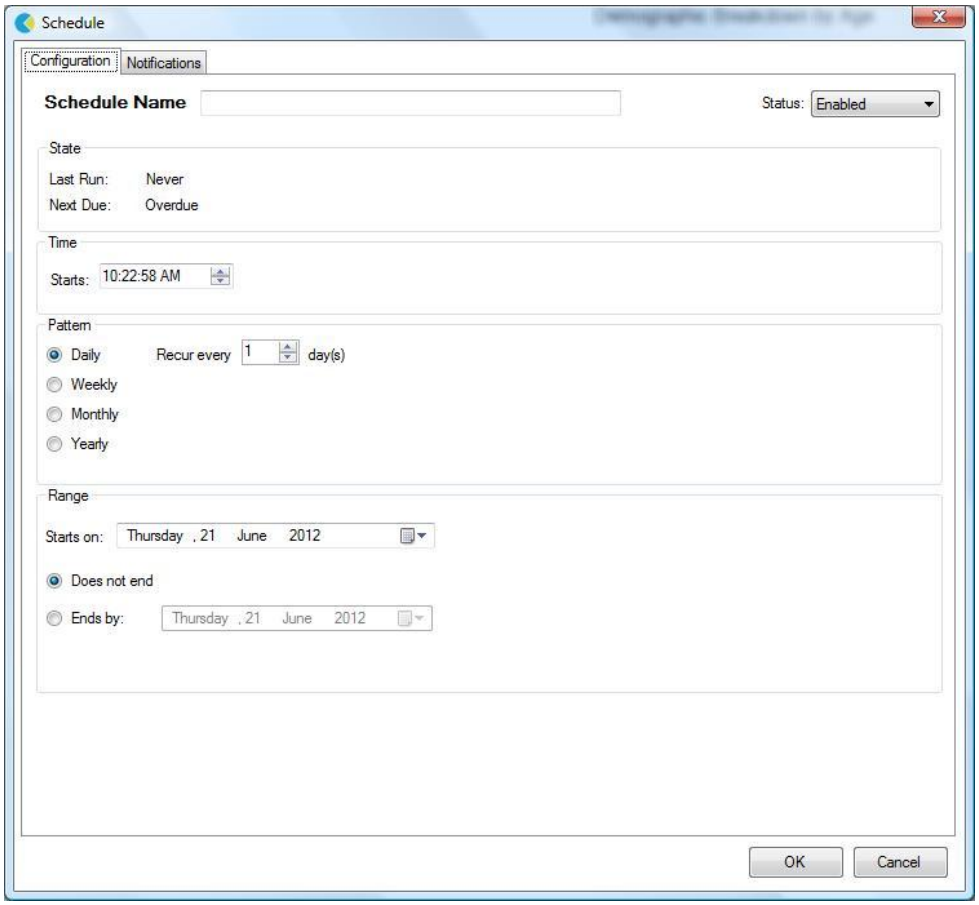


Figure 4.3A: Scheduled Collection tab options

The Configuration tab provides the following information and options:

- Schedule Name – a free text field allowing you to give your schedule a meaningful name
- Status – the status allows you to set the Scheduler to **Enabled** or **Disabled**
- State – provides information about the **Last Run** and **Next Due**
  NOTE: The first time you open the scheduler 'Last Run' will be set to 'Never' and 'Next Due' will be set according to the default pattern.
- Time – allows you to set the scheduled time of collection
- Pattern – allows you to set the scheduled time of collection by selecting one of the following options:
- Daily – allows you to select the recurrence, e.g. daily, every second day
- Weekly – allows you to select the day of the week for the scheduled collection
- Monthly – allows you to select the date of the month for the scheduled collection
- Yearly – allows you to select the month(s) for the scheduled collection. This option can be used for quarterly collections, i.e. select every third month
- Range – allows you to set the start and end date range of collection

2. On the Configuration tab (Figure 4.3B) provide a **Schedule Name** for your scheduled collection eg. in this example 'Monthly Collection'
3. Set the **Status** = Enabled
4. Choose the **Pattern** you require for your regular collection. Further options will be displayed according to your selection. In this example for a monthly collection, select the day(s) of the month.
5. Set the start and end options

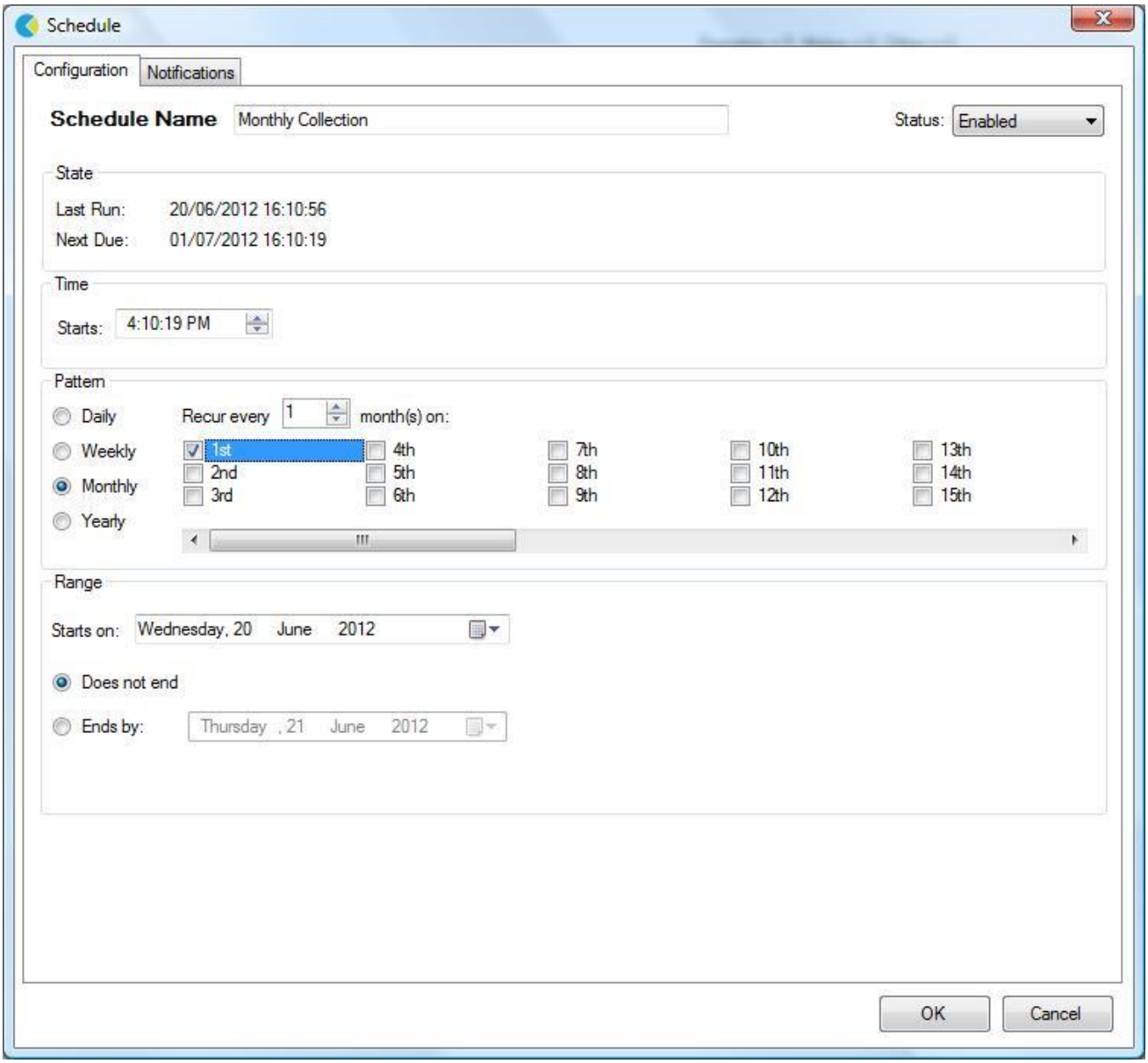


Figure 4.3B: Scheduled Collection Configuration tab

6. Click the Notifications tab (Figure 4.3C)
   This tab allows you to set the email notification options that should occur in the event of a collection Success, Warning or Failure.

7. Enter the email address you want a notification to be sent to
   Click the **Add** button for the appropriate list: Success, Warning or Failure

8. Enter the SMTP Server Settings
9. Click Test to send a test email and confirm settings are correct
10. Click OK
11. Your new schedule will be saved and will appear in the **Scheduled Tasks** list. You can make changes to the schedule by selecting it from this list.

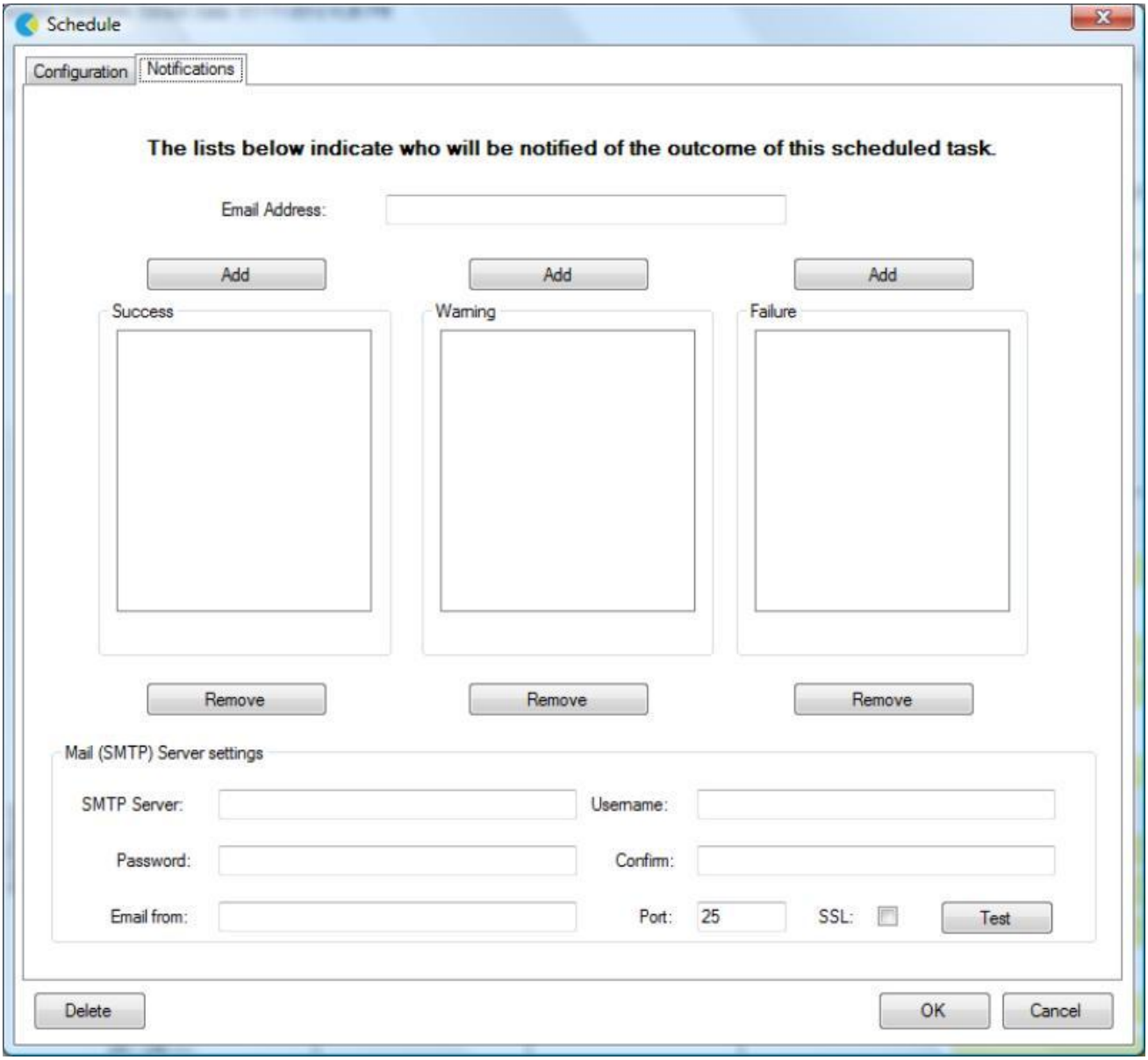


Figure 4.3C: Scheduler Notifications tab

If users have configured email notifications, an email will be sent. An example is as follows:

```
PCS Scheduler Service Automated email

Name      : CAT Scheduled Collect

Last run : 23/04/2008 12:26:39 PM (365 days ago)


Outcome---------------------------------

Result           : Success

Started          : 23/04/2009 4:12:56 PM
Completed        : 23/04/2009 4:13:03 PM
Total Run Time   : 7.753 seconds


Details---------------------------------

None


----------------------------------------
```

3.6.1.1 Disabling the Scheduled Collection

Setting the Status to **Disabled** will update the 'Next Due Run' to 'Disabled' and the rest of the information on the Configuration (and Notification) tab will be greyed out (Figure 4.3.1.1A). The information will be retained and become available again if you later update the Status to 'Enabled'.

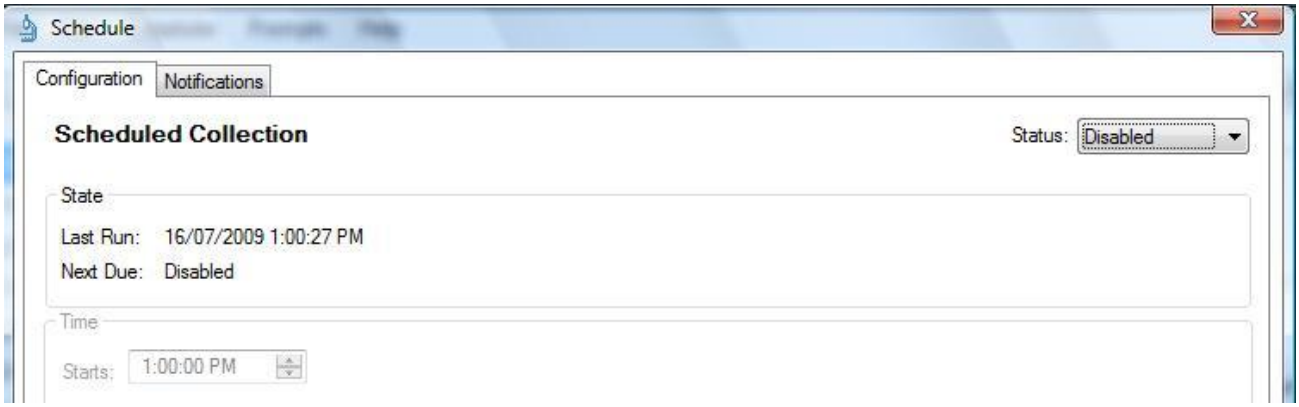


Figure 4.3.1.1A: Disabling the Scheduler

3.7 Scheduler History

The Scheduler history allows you to review when your scheduled tasks were run and whether they completed successfully.

1. From the Clinical Audit Toolbar, choose **Scheduler** > **History** (Figure 4.4A)

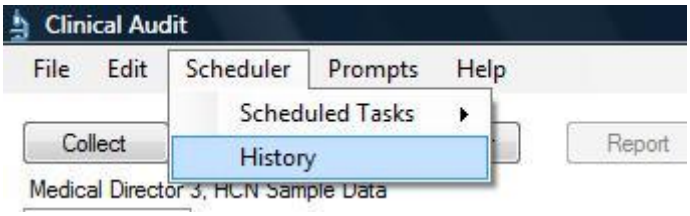


Figure 4.4A: Scheduler History menu option

2. The Schedule History screen will open (Figure 4.4B)

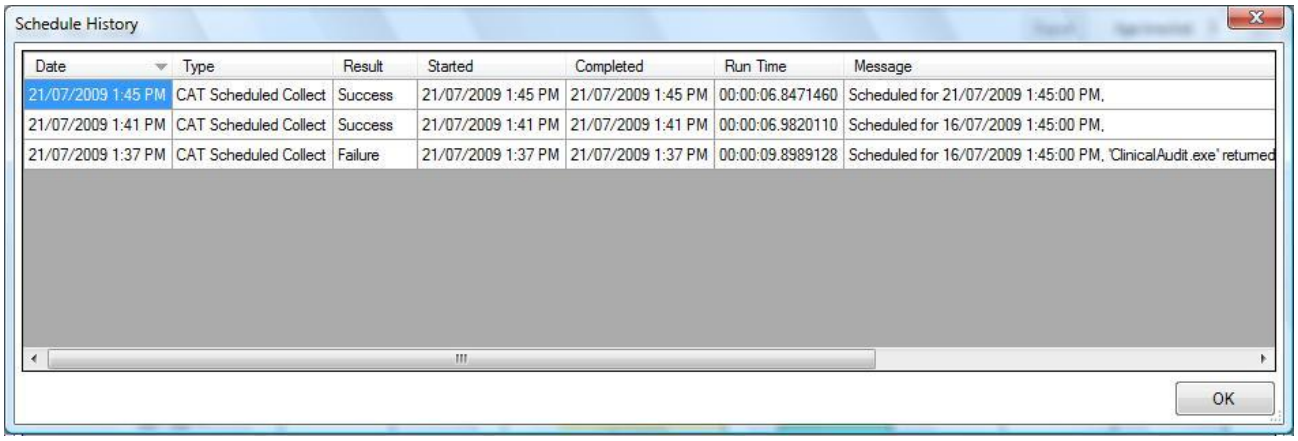


Figure 4.4B: Scheduler History screen

The Scheduler History screen will provide you with the following details about each scheduled task:

- Date – the date/time the task was initiated
- Type – the Scheduled Task Name that was run
- Result – success or failure
- If the result is failure, check the Message field for more information about why the task failed.
- Started – the date/time the task started
- Completed – the date/time the task completed
- Run Time – the time the task had taken to run
- Message – information about the task. This will include:
    - the date/time the task was scheduled to run – this may be earlier than the initiated date/time if, for example, the PC was switched off at the scheduled time
    - an error message if the collection failed

  NOTE: the error message may refer you to the Clinical Audit Tool log for further information. The log is available from the Clinical Audit toolbar **Help** > **View Log** menu option (Figure 4.4C). The Log file will open in Notepad and you will need to scroll to the bottom of the file to see information about the most recent data collection.

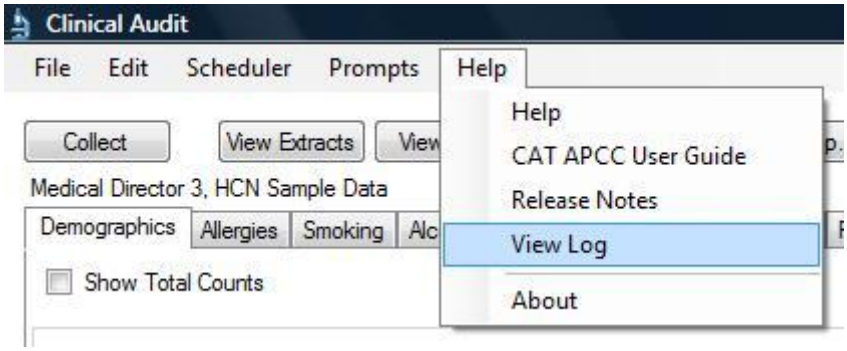


Figure 4.4C: CAT View Log option

4 Troubleshooting

4.1 Check the Scheduler Service is running

To check the scheduler service is running:

1. Open Control Panel
2. Click on Administrative Tools
3. Click on **Services**
4. Find PCS Scheduler Service in the list
5. Check the Status is set to **Started**
   If this is not the status:
6. Highlight the service
7. Click the link to Start the service

Reasons why the service may have stopped or not been started:
The windows account password has changed – to update the account details on the service:

1. Right-click the service
2. Choose Properties
3. Click the **Log On** tab
4. Update the password

The service should now be able to be started

4.2 Installing new versions of the Scheduler

To install a new version of the Scheduler you will need to first uninstall your existing version.

Refer to the section 'Uninstalling the Scheduler' for the steps you should follow.

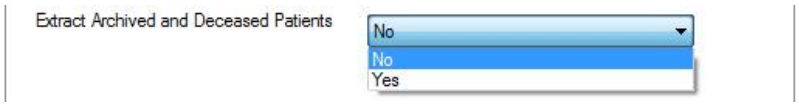
Note that installing a new version of the Scheduler will not change your existing Scheduler configuration settings or your Scheduler history log.

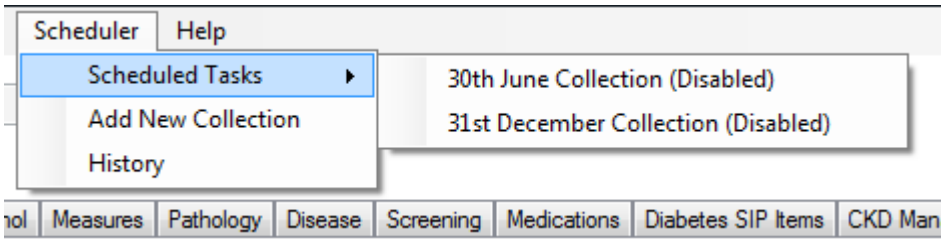
4.3 Uninstalling the Scheduler

1. Uninstall using the Windows Add/Remove Programs facility (Vista Programs and Features)
   - Open the Control Panel
   - Open Add/Remove Programs
   - Locate 'PCS Scheduler Service' in the list
   - Click on the 'PCS Scheduler Service' entry
   - Click the 'Remove' button (Vista 'Uninstall' option)

2. If the service is still in the Administrative Tools > Services list
   - Stop the service
   - From the command line type
     sc delete PenSchedulerService

5 Scheduler Installation Checklist

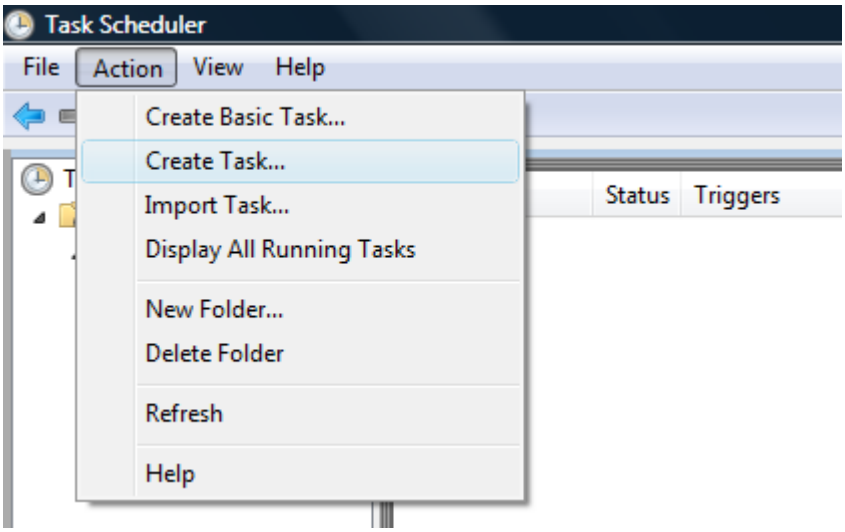
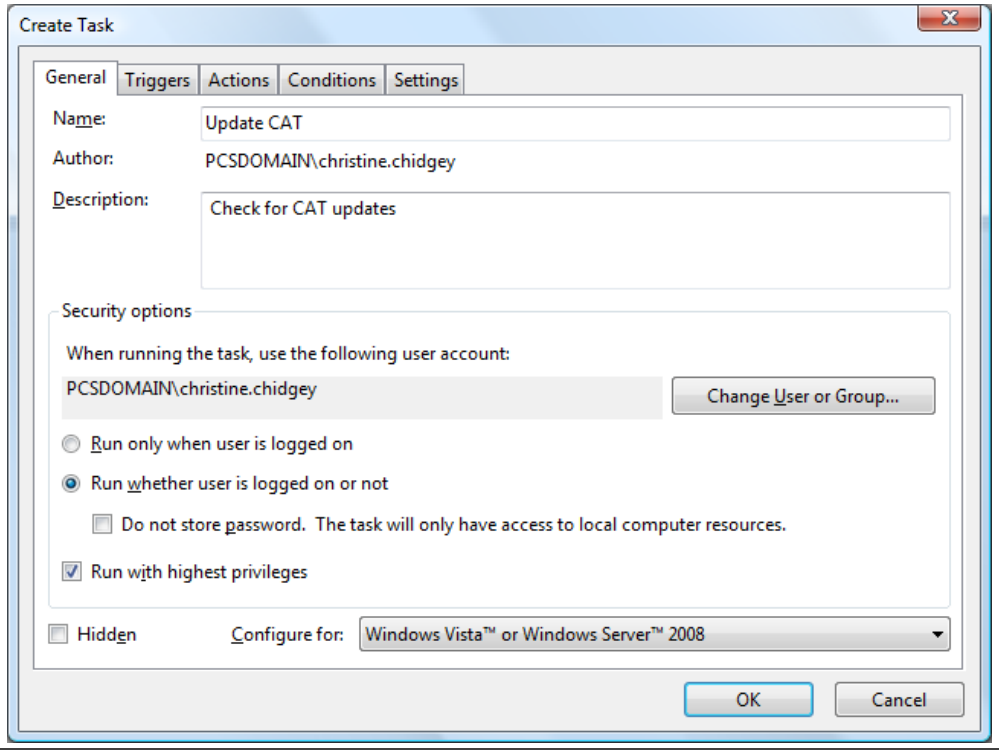
Task	Description	Completed
Scheduler Account Requirements	• Has Administrator rights • Does NOT enforce password change • Has CAT installed, configured and with a completed collection ➢ CAT minimum version 3.4 ➢ *Communicare users*: The Communicare CAT extractor allows you to select one or more locations. Ensure ***all locations required*** are selected on the Scheduler PC under the profile that will be logged in when the scheduler runs.	
Create scheduled task to check for CAT updates	Follow instructions provided in the next sections (separate instructions for non XP and XP machines)	
Is scheduler already installed? • Yes	DO NOTHING if scheduler has been working correctly to date	
• No	Install new version 2-0-3 ➢ Make sure the .exe is saved to a local drive (not the desktop)	
CAT Configuration		
	LOGIN TO CAT <u>AFTER</u> SCHEDULER HAS BEEN INSTALLED This will ensure that scheduler is configured under the correct account	
MD and BP preferences	Go to preferences tab and set new option 'Extract Archived and Deceased Patients' to 'Yes' 	
Scheduler already setup?	If the practice has already had the scheduler installed and configured you will need to check the scheduled times already set up do not create duplicate times with the new schedules to be configured. (It is unlikely as practices have only been able to configure one schedule to date).	

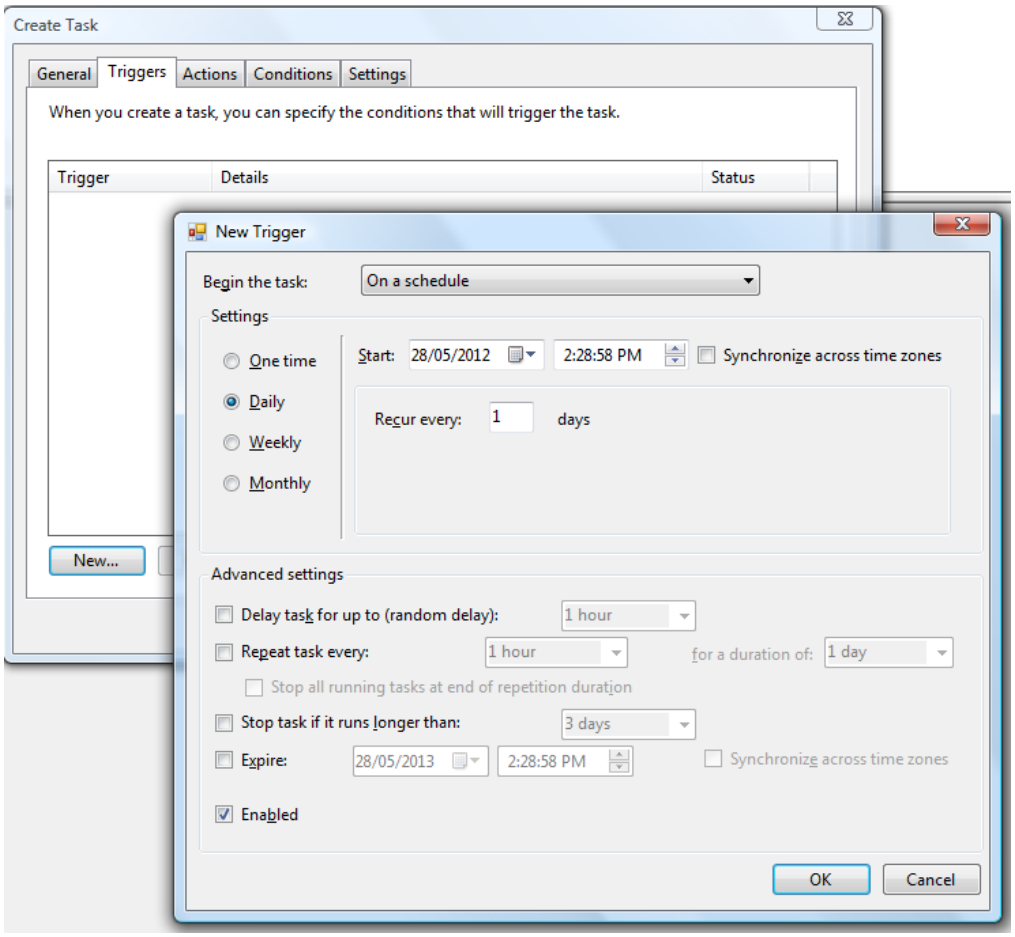
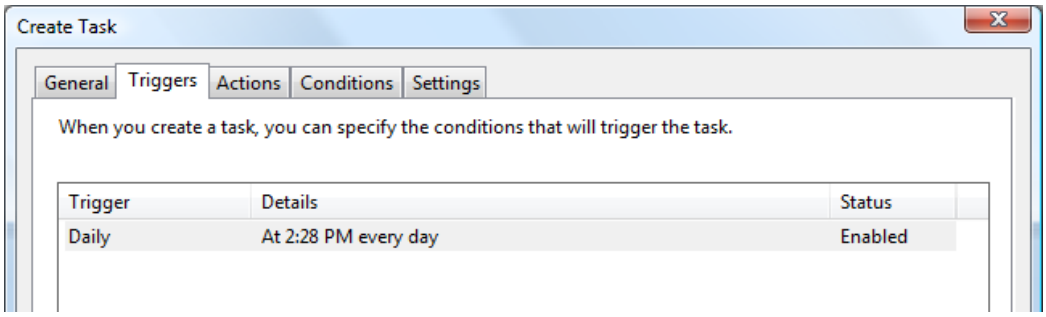
Configure Scheduler	• The 30th June and 31st December collections required for NKPI reporting are preconfigured but not enabled
	• Select each of these collection options
	  ○ Set the status to 'Enabled'
	  ○ The collection time is preconfigured to 11pm – confirm the time with the practice as 11pm may interfere with their end of financial year processing
	  ○ Update the collection time
	  ○ Click 'OK' to save
	  ○ The scheduled tasks will now show as Enabled from the menu
	 	

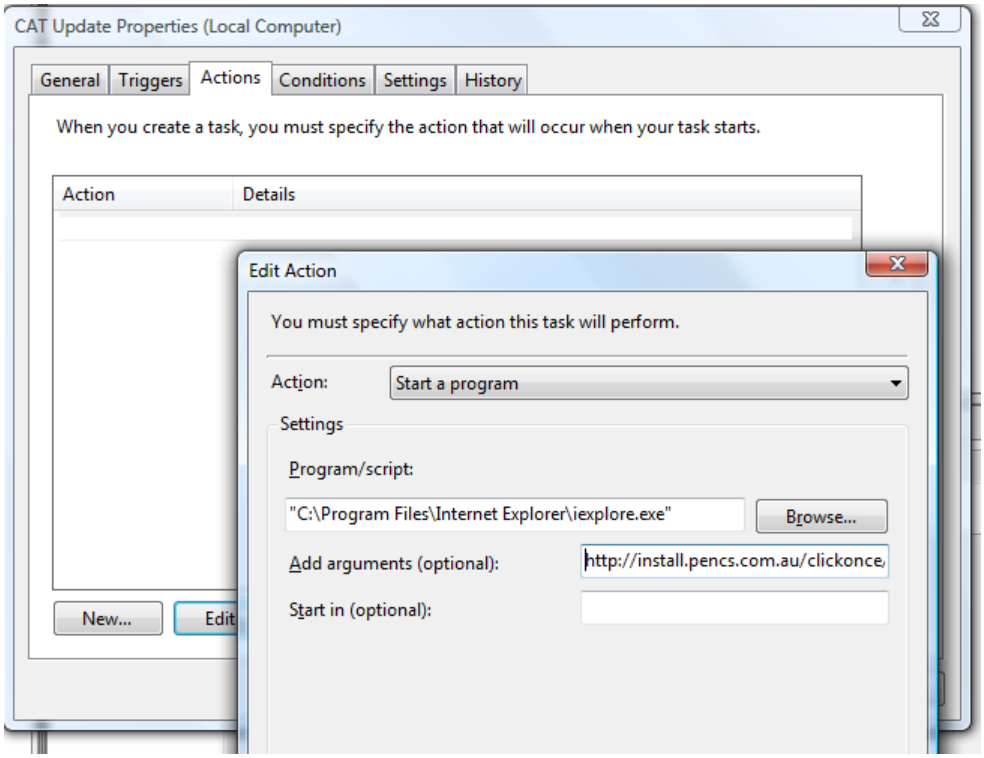
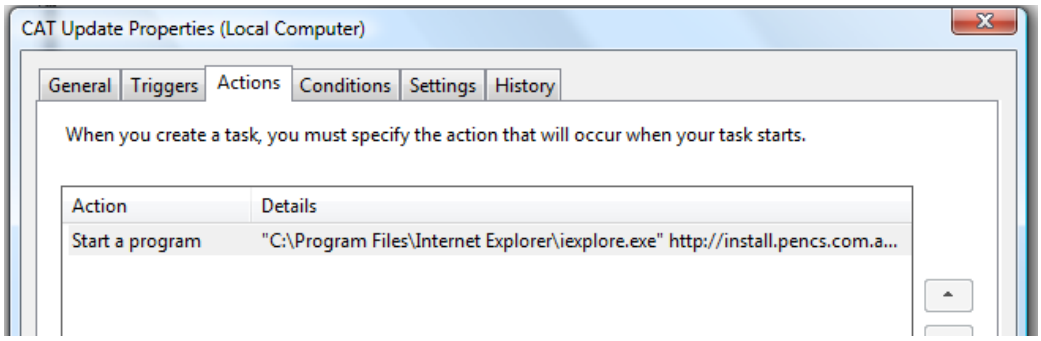
Configure Notifications	• Notifications are set up via the second tab of the scheduled task ○ You will need the mail server credentials	

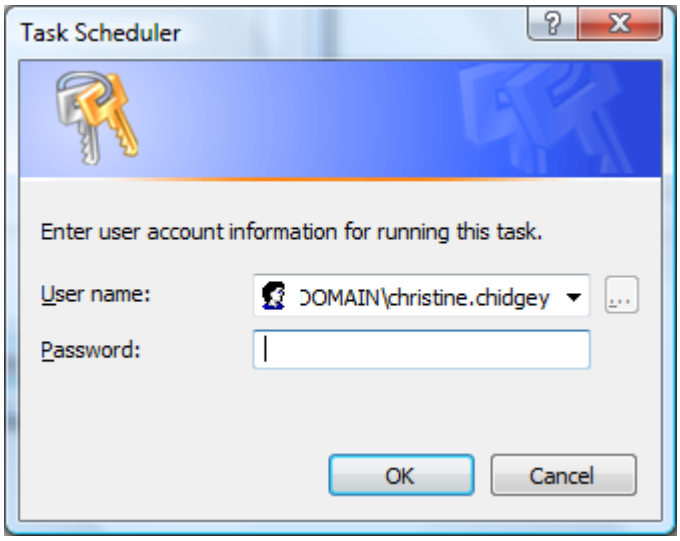
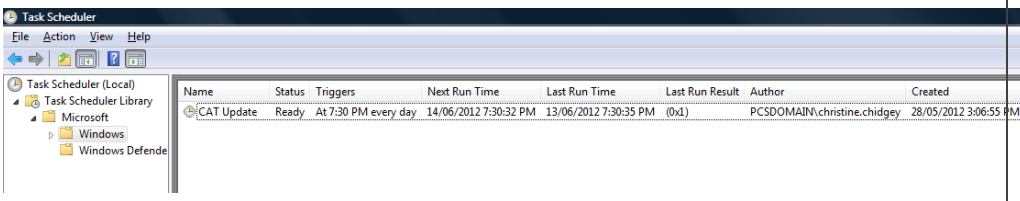
Test Scheduler for new installations	• Schedule a collection to run straight away and ensure this completes and notification is sent to the nominated email address.
	• You can use Windows Task Manager to check the scheduler is running
	In the 'Processes' tab check the following is running:
	  ○ Medical Director and Best practice
	  – ClinicalAudit.exe (1 instance if CAT is not running, 2 instances if CAT is running
	  ○ Zedmed – PenDataExtract.exe
	  ○ Communicare – ccCATExport.exe
	• Once the collection has completed:
	  ○ The Scheduler History will display an entry
	  ○ The new extract will appear when the extracts panel is refreshed	

6 Create scheduled task to check for CAT updates (non XP machines)

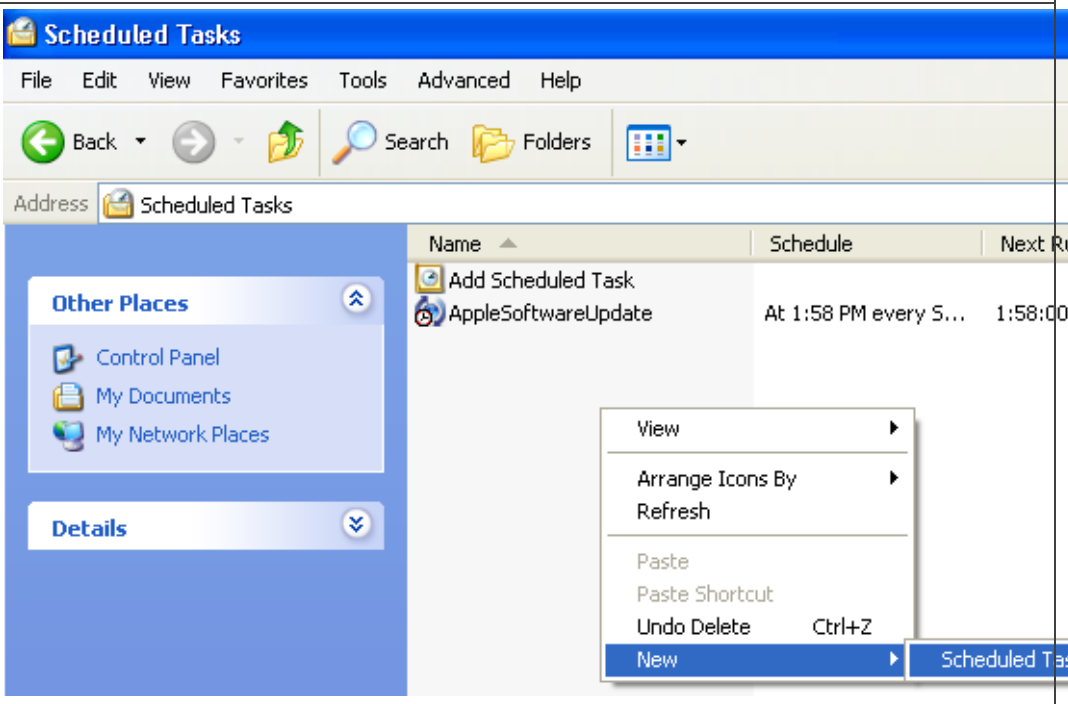
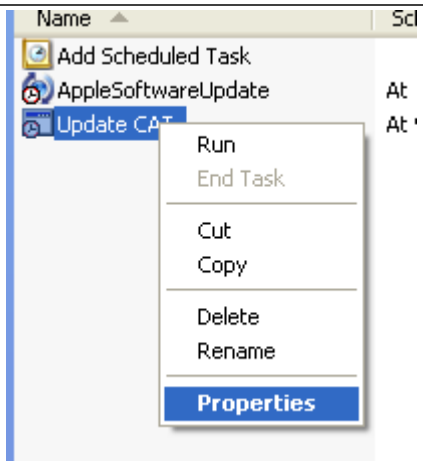
Task	Description
Open Administrative Tasks > Task Scheduler Select Action > Create Task	
General tab Enter > Name = Update CAT > Description = Check for CAT updates	

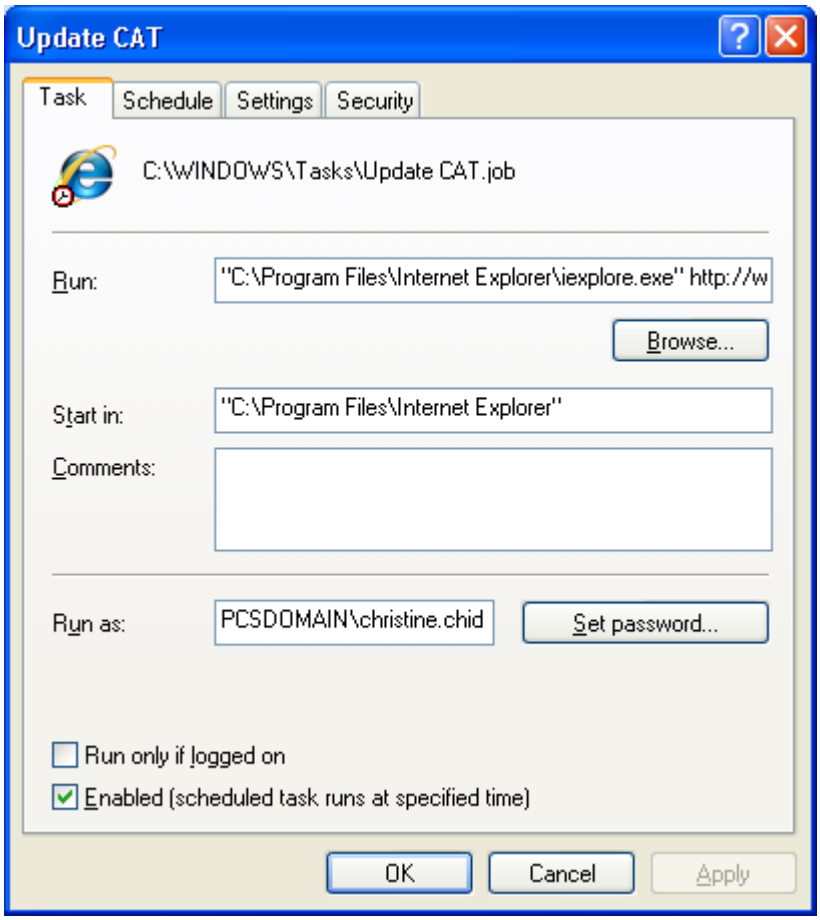
Triggers tab Create a new trigger The task to Run 'On a schedule' > Daily at a time to suit the practice > Enabled ticked Click OK	
Triggers tab will show task details	

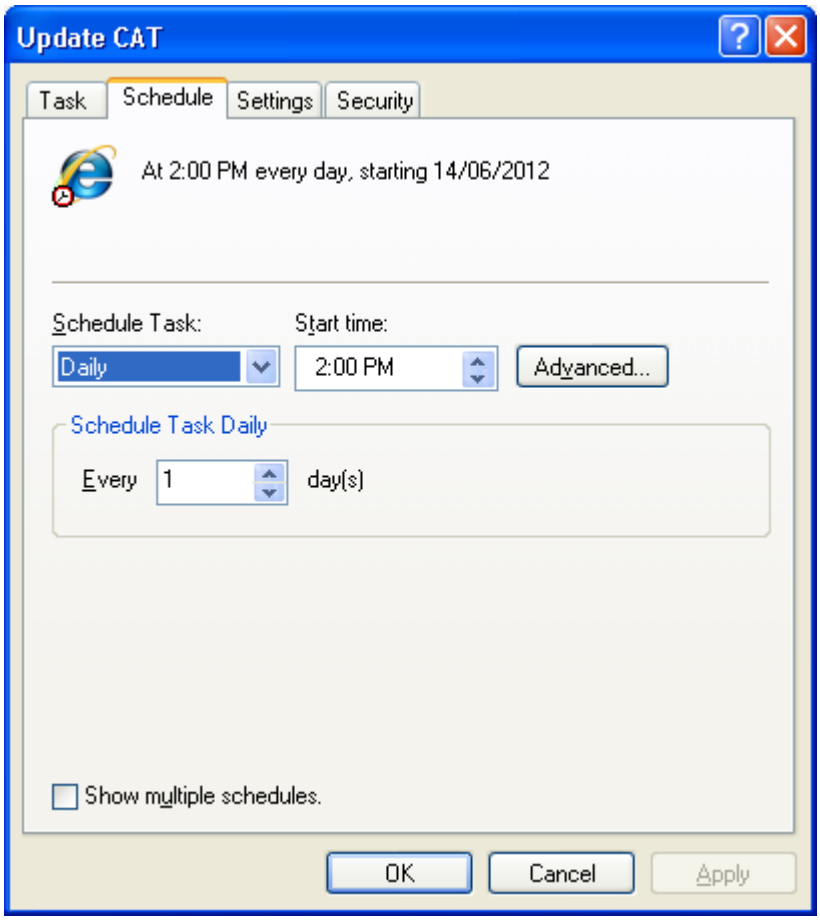
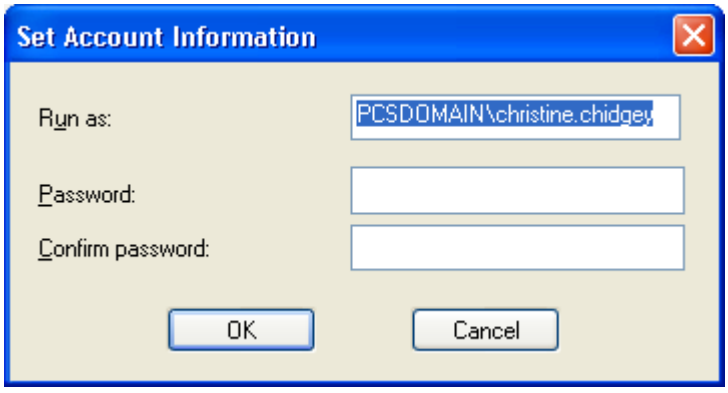
Actions tab Create a new action Action to 'Start a program' > Program Browse to Internet Explorer (C:\Program Files\Internet Explorer\iexplore.exe) > Arguments Paste in the link to the clinical audit .application file Click OK	Arguments: http://install.pencs.com.au/clickonce/clinicalaudit/ClinicalAudit.application 
Actions tab will show program details	

Click OK You will be prompted to enter your password to save the task	
The task will be saved and be listed under Windows tasks.	

7 Create scheduled task to check for CAT updates (XP machines)

Task	Description
Open Control Panel > Schedule Tasks Right-click in pane Select New > Scheduled Task	
Rename the new task = Update CAT Right-click the task and select Properties	

Task tab Run: Browse to Internet Explorer (C:\Program Files\Internet Explorer\iexplore.exe) Run (Arguments) Paste in the link to the clinical audit .application file The Run field will contain the string "C:\Program Files\Internet Explorer\iexplore.exe" http://www.pencs.com.au/clickonce/clinicalaudit/clinicalaudit.application > Enabled ticked	Arguments: http://install.pencs.com.au/clickonce/clinicalaudit/ClinicalAudit.application 

Schedule tab Set the schedule task to > Daily at a time to suit the practice Click OK	
You will be prompted to enter your password to save the task	
The task will be saved and be saved under Scheduled tasks.	